

HKICPA Seminars – IT Series (May to July 2017)

This series of seminars is designed to provide professionals with knowledge of the latest information technologies available in the market, how these technologies can enhance business performance, as well as their implications for businesses and the accounting profession.

| Topic/ Programme code ^(Note) | Date and Time | CPD hours | Language | Speakers |
|---|--|-----------|-----------|--|
| Financial Planning and Analytics: From Spreadsheets to Strategy (SCPD17050901) | Tuesday, 9 May 2017 7:00 p.m. – 8:30 p.m. | 1.5 | English | Mr. Ryan Wen Country Manager, Greater China, Anaplan Inc. Mr. Andy Wu Solution Advisory Lead, Anaplan Inc. |
| Breaking the Norms of Traditional Finance through Cloud Technology (SCPD17031502) | Friday, 2 June 2017 7:00 p.m. – 8:30 p.m. | 1.5 | English | Ms. Susanna Tom Master Principal Consultant, Oracle NetSuite Hong Kong Mr. Raymond Mak Account Executive, Oracle NetSuite Hong Kong |
| Digital Boardroom – Finance Transformation (SCPD17060501) | Monday, 5 June 2017 6:30 p.m. – 9:00 p.m. | 2.5 | English | Mr. Nelson Chow Director, Advisory Services, Greater China, Ernst & Young Advisory Services Limited Mr. Ben Shu Director, Center of Excellence, Enterprise Performance Management, SAP Greater China Mr. Greg Wong Director, Analytics, Center of Excellence, BI, SAP Greater China |
| Modern Finance in the Digital Age (SCPD17062301) | Friday, 23 June 2017 7:00 p.m. – 8:30 p.m. | 1.5 | Cantonese | Mr. Matthew Mok Practice Solutions Consultant, Oracle Systems Hong Kong Limited |
| How to Design and Implement a Cloud Strategy for SMEs (SCPD17071101) | Tuesday, 11 July 2017 7:00 p.m. – 8:30 p.m. | 1.5 | English | Mr. Jason Yau Partner, Technology and Management Consulting, RSM Hong Kong Consulting Limited |

Note: IT solutions or products may be introduced through demonstration by the speakers in the seminars.



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|-----------------------|---|------------------|------------------|
| Venue | Hong Kong Institute of CPAs, 27/F, Wu Chung House, 213 Queen's Road East, Wanchai, Hong Kong | | |
| Format | Seminar | | |
| Fee (for each) | | <u>1.5 hours</u> | <u>2.5 hours</u> |
| | HKICPA member or student: | HK\$190 | HK\$320 |
| | HKICPA member (Online enrolment) | HK\$180 | HK\$320 |
| | IA/ HKIAAT member or student: | HK\$190 | HK\$320 |
| | Non-member: | HK\$330 | HK\$550 |
| Participants | CFOs; Financial controllers; Planning managers; Financial analysts; and persons who wish to learn about the benefits of cloud, and those whose companies are contemplating an upgrade of their current accounting/ ERP system | | |
| Competency* | Information technology; Accounting and financial reporting; Management accounting | | |
| Rating* | Intermediate to advanced level | | |

* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.

About the programme

Financial Planning and Analytics: From Spreadsheets to Strategy (SCPD17050901)

Course outline

With the evolution of finance over time, electronic spreadsheets have been widely adopted by business organizations for financial planning and analytics. However, under a more diverse, dynamic, and interconnected business environment nowadays, electronic spreadsheets might not be an effective tool to orchestrate financial performance today.

This seminar will introduce how disruptive technology changes the key finance and accounting process. The speakers will share how innovative enterprises transform their strategic planning with next generation spreadsheets for smarter business.

After joining this seminar, participants will gain knowledge about:

- The top challenges facing strategic planners
- How disruptive technology orchestrates financial performance
- How organizations facilitate integrated business planning across functional units with case studies

Speakers

Mr. Ryan Wen, Country Manager, Greater China, Anaplan Inc.

Mr. Andy Wu, Solution Advisory Lead, Anaplan Inc.

With 10 years of experience in IT and management consulting industry, both Mr. Wen and Mr. Wu have been helping business organizations to improve their business effectiveness with disruptive technology. They see many organizations muddling through spreadsheet silos, spending most of the time reconciling data with no business value added to financial planning and analytics processes. Hence, Mr. Wen and Mr. Wu decided to join Anaplan and support over hundreds of enterprises to transform their budgeting, planning and forecasting by connecting their spreadsheet silos with a smart planning platform.

Both Mr. Wen and Mr. Wu are MBA alumni of The Hong Kong University of Science and Technology. They also hold a MAcc degree from The Chinese University of Hong Kong and a MSc degree in Electrical Engineering from University of California, Davis respectively.



About the programme

Breaking the Norms of Traditional Finance through Cloud Technology (SCPD17031502)

Course outline

Cloud computing eliminates the need for individual companies to buy, deploy, maintain IT infrastructure and application software. In the cloud computing model (also known as software-as-a-service, or SaaS), the vendor takes responsibility for deploying and managing the infrastructure (servers, operating system software, databases, data center space, network access, power and cooling, etc.) and processes (infrastructure patches/upgrades, application patches/upgrades, backups, etc.) that are required to run and manage the full solution. Cloud computing delivers economies of scale through reducing the total cost of ownership (TCO). Learn how to differentiate true cloud vs. fake cloud technologies and how finance function can reap the benefit of cloud computing.

After joining this seminar, participants will learn:

- TCO benefits of cloud technology
- How to address multiple accounting standards, currencies and taxations in a single system
- Real time visibility to simplify financial closing
- Advance reporting capabilities through cloud platform

Speakers

Ms. Susanna Tom, Master Principal Consultant, Oracle NetSuite Hong Kong

Ms. Tom has over 13 years of experience in ERP solution with focus on financial management. She has involved in a number of ERP system deployments for a variety of industries including telecommunication, retail, wholesale distribution and non-governmental organization.

Mr. Raymond Mak, Account Executive, Oracle NetSuite Hong Kong

Mr. Mak's career spans a 14-year journey globally with Greater China focusing in the high technology and complex environment across enterprise resource planning, business intelligence, big data, cloud, digital commerce, system integration and telco solution. His industry engagement spread across banking and finance, telecommunications, manufacturing, retail, and real-estate. He is also well versed in technical expertise as an e-commerce consultant with the American E-Commerce Association and China General Chamber of Commerce and has published three journal papers in KES conference and Springer on e-commerce and big data analytics and forecasting technology reference in artificial intelligence research area.



About the programme

Digital Boardroom – Finance Transformation (SCPD17060501)

Course outline

In this new digital world, traditional mindset for managing business is no longer enough. Business executives require new insight and new mindset in managing their businesses in order to stay competitive. How to minimize the investment in and make use of advanced technology? How to leverage a company's IT asset (data) and dig out hidden value and pattern without data scientist?

After joining this seminar, participants will understand:

- How companies can apply analytics to business data to describe, predict, and improve business performance, recommend action, and guide decision making
- How data can be managed and played around through multi-touch TV panel/video demo
- How cloud solutions can be deployed in a minute (e.g. data preparation, content creation, interactive analysis, story sharing)

Speakers

Mr. Nelson Chow, Director, Advisory Services, Greater China, Ernst & Young Advisory Services Limited

Mr. Chow is the finance and procurement leader of EY Greater China Advisory practice. He has been assisting CEOs, CFOs and CPOs in transformational initiatives to drive growth, operation excellence and margin improvement for many years. Mr. Chow has advised his clients over a broad range of industries including power and utilities, manufacturing, automotive, food and beverage, telecom, fast-moving consumer goods (FMCG), financial services and industrial products.

Prior to joining EY, Mr. Chow worked for SAP Ariba, Johnson Controls, The Hong Kong Jockey Club and other leading professional firms.

Mr. Chow has an Executive MBA degree from The Chinese University of Hong Kong and an undergraduate degree in BBA from The Hong Kong University of Science and Technology. He participated in executive program in the Stanford University and he is a Council Member of the Institute for Supply Management - Hong Kong (ISM-HK). Mr. Chow is also the Vice President of The Chinese University of Hong Kong Alumni Entrepreneurs Association (CUAEA). He speaks at public forums and recently acted as the moderator for the 7th CFO Innovation Hong Kong Forum, the EY CGMA cost optimization forum and EY ISMHK procurement forum.

Mr. Ben Shu, Director, Center of Excellence, Enterprise Performance Management, SAP Greater China

Mr. Shu is the leader of Center of Excellence for analytics solution responsible for driving business across Greater China for SAP. This includes business intelligence, predictive analysis, enterprise performance management, governance risk compliance and CFO office solutions. As a trusted advisor, Mr. Shu has advised many companies on how end-to-end business analytics solutions help facilitate closing the gap between strategy and execution that is most often seen as barrier to increased performance. Best practices such as ensuring trusted information, proactively managing risk and creating enterprise visibility are vital to achieve benefits like strategic alignment, profitable performance and confident decisions across the enterprise.

Mr. Greg Wong, Director, Analytics, Center of Excellence, BI, SAP Greater China

Mr. Wong has been in the IT industry focusing on Business Intelligence (BI) and Data Warehouse for more than 15 years. He was the very first Technical Consultant in Crystal Decision then acquired by BusinessObjects at July 2003. SAP acquired BusinessObjects in December 2007. He left SAP at end of 2010 when he was the Head of Business Intelligence and Information Management for Greater China. He has in-depth knowledge on SAP BusinessObjects Business Intelligence Solutions and the Enterprise Information Management Solutions. He is a technical person but understands how important the solutions need to map into business in order to achieve the business value. Mr. Wong has advised lots of strategic SAP customers during SAP BI implementation. He understands the tactic how to drive the BI success within the organization. After he left SAP, he has stayed in Shanghai, China as a vice president of Global Presales for a Chinese Enterprise Software Vendor (eBaoTech) to provide enterprise core insurance applications for insurance company around the world. He understands the BI value is all about business instead of product's features and functions. He re-joined SAP in September 2015 as a Director, Analytics, Centre of Excellence, BI where he focuses on supporting SAP BI sales on those strategic accounts again.



About the programme

Modern Finance in the Digital Age (SCPD17062301)

Course outline

Can your current finance and accounting systems keep pace with technology change?

Research shows that legacy finance and accounting systems were not designed for usability and insight. 88% of organizations undergo some types of transformation today. Are these true for your organization?

To secure the future, you may need to radically reshape your business model; and that has big implications on your finance structure, the types of systems you use and the ways you use them. True operational agility is achieved when effectiveness and efficiency join forces, but often there are barriers to achieving operational agility. Complex systems that do not meet your needs, and the proliferation of spreadsheets making data driven decisions a challenge, are just a few examples. Modern finance in the cloud can help gaining the agility and productivity.

This seminar will explain in simple, clear and straightforward ways – why customers need a modern cloud Enterprise Resource Planning (ERP) to stay relevant and thrive in this dynamic economy.

After joining this seminar, participants will understand:

- The top 10 signs that indicate it is time to deploy a modern ERP
- Fundamental characteristics that define modern ERP
- Best practices on how to begin your journey to modernization

Speaker

Mr. Matthew Mok, CPA, CGA, MBA, MScIS, PMP
Practice Solutions Consultant, Oracle Systems Hong Kong Limited

Mr. Mok is the Practice Solutions Consultant for ERP/ Enterprise Performance Management (EPM). He has over 20 years of experience delivering solutions to support financial users across a wide range of industries. His experience extends across sales, implementation and marketing of EPM solutions. Working with customers, he has empowered a wide range of solutions from large international consolidations to enterprise budgeting and planning applications, cost and profitability analysis and regulatory compliance.



About the programme

How to Design and Implement a Cloud Strategy for SMEs (SCPD17071101)

Course outline

With shrinking margins, increased competition and tighter regulations, businesses need to find alternative ways to achieve efficiencies and agility. A properly designed cloud strategy can help SMEs gain competitive advantage by achieving significant cost-savings and better allocation of financial resources. Cloud-based software such as ERP system or Business Intelligence (BI) software enable SMEs to make informed decisions based on real-time data.

After joining this seminar, participants will gain knowledge about:

- Technology Voucher Programme
- The importance of thinking about a cloud-strategy for SMEs
- Cloud-strategy roadmap
- Security features of cloud services
- Financial analysis on cloud versus on-premise strategy
- Pros and cons on cloud-based ERP system and BI software
- Financial assistance available under the latest government scheme

Speaker

Mr. Jason Yau, CPA(US), CITP, MSc

Partner, Technology and Management Consulting, RSM Hong Kong Consulting Limited

Mr. Yau is a Partner of RSM Hong Kong with a focus in US Services and Technology and Management Consulting (TMC). He has 14 years of professional experience and was a member of RSM US global expat team. In 2011, Mr. Yau was expatriated to Hong Kong to support RSM's initiative in expanding service capabilities and qualities in Asia-Pacific region. With Mr. Yau's profound understanding of the culture and his fluency in English, Mandarin and Cantonese, he is able to provide valuable advices that are tailored to both American and Chinese companies while maintaining accurate and seamless communication with the management.

Prior to joining RSM US, Mr. Yau was a regulator with the New York Mercantile Exchange (NYMEX), primarily conducting financial and compliance audits on key accounts including JP Morgan, Barclays Capital, and BNP Paribas. Some of his key clients at RSM US include Aviva Capital Management, American Securities Capital Partners, Olympus Capital Management, Cornerstone Capital Management, Rose Grove Capital Management, United Capital Markets and Forex Capital Markets (NYSE: FXCM).



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HKICPA Event Enrolment Form (For Support Programme)

Finance & Operations Department,
 Hong Kong Institute of CPAs,
37/F, Wu Chung House, 213 Queen's Road East, Hong Kong

Payment & Enrolment Status Enquiry: 2287 7381
 e-mail: finance@hkicpa.org.hk
 Fax : 2893 9853

Course Information Enquiry:
 2287 7386 / 2287 7253
 e-mail: cpd@hkicpa.org.hk

FOR OFFICE USE

Deadline: 7 working days before the date of the programme

| No. | Membership | | Full Name of Participant(s) (Block Letters) | Company | Email address ⁽²⁾ (Block Letters) | Programme Code | Fee (HK\$) |
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| | No. | Status ⁽¹⁾ | | | | | |
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| Total (HK\$) | | | | | | | |

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Contact Person : _____ Tel No. : _____ Fax No. : _____ E-mail : _____
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- Notes:**
- Membership Status: **NP** = Non-Practising, **P** = Practising, **IA** = International Affiliate, **S** = Student, **HKIAAT** = HKIAAT Student or Member, **GAA** = GAA Passport holder, **NM** = Non-Member.
 - Confirmation of enrolment will be sent to you via email. You can check your enrolment status at "MyCPA" at www.hkicpa.org.hk. Unsuccessful enrolment will be notified with full refund.
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 - No unauthorized audio or video recording is allowed at CPD events.

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